



Duty Statement

Request for Personnel Action (RPA) Number 2122-03378	Effective Date
Classification Title Program Specialist I	Position Number 564-TBD-4364-TBD
Working Title Program Specialist I	Bureau and Section Individual & Pass Through Entity Audit Bureau (IPTE)

Our mission is to help taxpayers file timely and accurate tax returns, and pay the correct amount to fund services important to Californians. In order to support this mission, FTB employees strive to develop in CalHR's Core Competencies: Collaboration, Communication, Customer Engagement, Digital Fluency, Diversity and Inclusion, Innovative Mindset, Interpersonal Skills, and Resilience. Core competencies are the knowledge, skills, and behaviors which are foundational to all state employees regardless of classification.

General Statement

Under the general direction of an Administrator II, the incumbent is responsible for independently conducting large, complex, and significant audits to determine if taxpayers have correctly self-assessed themselves. The incumbent will be expected to perform the duties in accordance with the department's Mission and Statement of Principles of Tax Administration.

Essential Functions

Percentage	Description
40%	Independently conduct very large, complex audits in accordance with audit standards, policies and procedures as detailed in the Manual of Audit Procedures (MAP). Maintain the confidentiality of data received or developed during the audit in accordance with the provisions of the Security and Disclosure Manual. Perform all applicable pre-audit work in accordance with the needs of the cases assigned and the pre-audit requirements set forth in the MAP. Protect statutes of limitations by planning and conducting audit activities such that reasonable cooperation on the part of the taxpayer can result in the completion of the audit within the normal statute of limitations. Confer with taxpayers or legal representatives, requesting pertinent information and/or documents in accordance with provisions of MAP.
25%	Perform necessary field-work consistent with the needs of each case, preparing work paper files that document both the information developed during the audit and the procedures used to obtain that data, in accordance with MAP instructions. Prepare audit report packages and compile records and schedules in support of reports submitted, in accordance with MAP provisions. Provide taxpayers written and verbal summaries of recommendations, describing both the content and basis of the audit proposals, and instructing them as to established protest procedures.
20%	Act as team resource for PASS (Professional Audit Support System) and may provide lead and technical guidance to the other auditors on their cases. Act as a team leader on the small scale teams and projects.
10%	Confer with FTB Administrators and/or other Program Specialists on matters of policy and legal interpretation, and assist in the recommendation of law, regulation, policy or procedural changes as necessary using established department channels for such recommendations.

Marginal Functions

Percentage	Description
5%	Conduct formal conferences and hearings related to the audit program.

Employee: I confirm that I have read and understand the described duties and functions of this position.

Name (Print)

Signature

Date

Supervisor: I certify that the above information accurately represents the described duties and functions of this position.

Name (Print)

Signature

Date